Application Tracking System for Brokers and Agents

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System Requirements to View

Here are the minimum computer system requirements to successfully view this on-demand presentation with audio. *(Note: quality of the sound is based on viewer's specific system configuration and its sound card.)*

Requirement	Minimum Acceptable
Supported Browsers	•Internet Explorer 6 or 7* •Firefox 2.0 •Safari 3.0
Browser Settings	•Allow Pop-ups •Enable Java Script •Enable Cookies
Flash Player	Adobe Flash version 6.0 or higher
Recommended Screen Size	1024 x 768 pixels
Bandwidth	56kbps standard presentation 100kbps for Video Slides

* recommended

Application Tracking System

- A web-based tool launched in November 2008
- Direct input from distribution partners during design/build of “App Tracker”
- Broker and agent access to: **agent contract status**, **client enrollment status**, **production by products sold**, **commission payments**, **summary reports** … and more!

Plenty of Helpful Information

Requires “basic use” instruction, provided in this presentation

Additional information and support:

- Coventry broker communications,
- App Tracker User Manual on the Broker Portal,
- BSU phone support/webinars,
- Distribution partners to their down-line and
- administrative staff training

App Tracker Makes a Difference!

- Manage, maximize Book of Business
- Efficient and convenient...24/7 access
- Get the status of an application
- App status generally available within 3-5 business days after receipt at Coventry
- View production and commission reports

Let App Tracker go to work for you!

In This Presentation

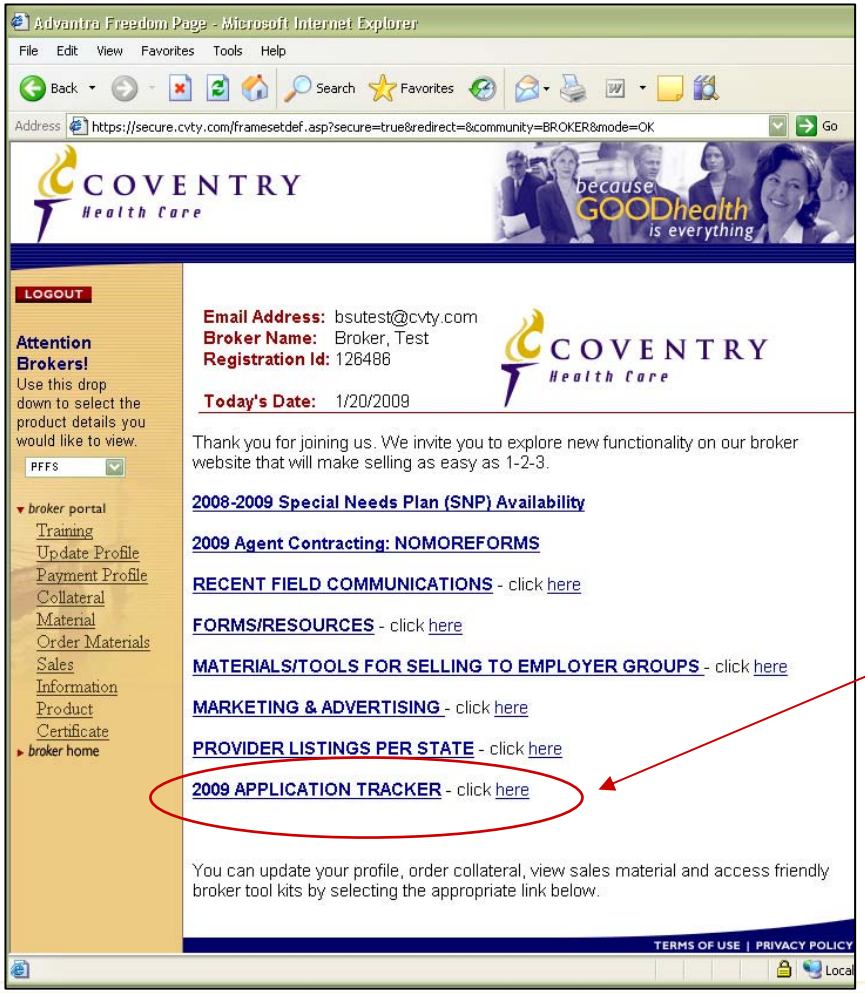
How to access the App Tracker

- Log on via the secure broker portal www.coventry-medicare.com

Contents of Menu Screen –What's available?

- Most frequently used Reporting Tools: **App Submission / App Specifics / Commissions**
- Examples of how you will access information
- What to do if you cannot find what you are looking for

How to Access App Tracker


Advantra Freedom Page - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://secure.cvty.com/framesetdef.asp?secure=true&redirect=&community=BROKER&mode=OK
Go
COVENTRY Health Care
because GOODhealth is everything
LOGOUT
Attention Brokers!
Use this drop down to select the product details you would like to view.
PFFS
broker portal
Training
Update Profile
Payment Profile
Collateral Material
Order Materials
Sales Information
Product Certificate
broker home
Email Address: bsutest@cvty.com
Broker Name: Broker, Test
Registration Id: 126486
Today's Date: 1/20/2009
COVENTRY Health Care
Thank you for joining us. We invite you to explore new functionality on our broker website that will make selling as easy as 1-2-3.
2008-2009 Special Needs Plan (SNP) Availability
2009 Agent Contracting: NOMOREFORMS
RECENT FIELD COMMUNICATIONS - click here
FORMS/RESOURCES - click here
MATERIALS/TOOLS FOR SELLING TO EMPLOYER GROUPS - click here
MARKETING & ADVERTISING - click here
PROVIDER LISTINGS PER STATE - click here
2009 APPLICATION TRACKER - click here
You can update your profile, order collateral, view sales material and access friendly broker tool kits by selecting the appropriate link below.
TERMS OF USE | PRIVACY POLICY

- The Application Tracker System will be accessed through the broker portal at www.coventrymedicare.com

- The link you will select is called: **2009 Application Tracking Application**

How to Log-in to App Tracker

1. After you have clicked on the 2009 Application Tracking System link

   you are directed to a **Log In Screen**

   - Enter your Agent Writing Number (AWN)
   - Enter your Password

2. First-time user password: Coventryxxxx

   (Replace X's with last 4 digits of your SSN#)

Simply Follow the Prompts

3. First-time Users: Reset to a secure password, (follow the prompts in the pop-up box)

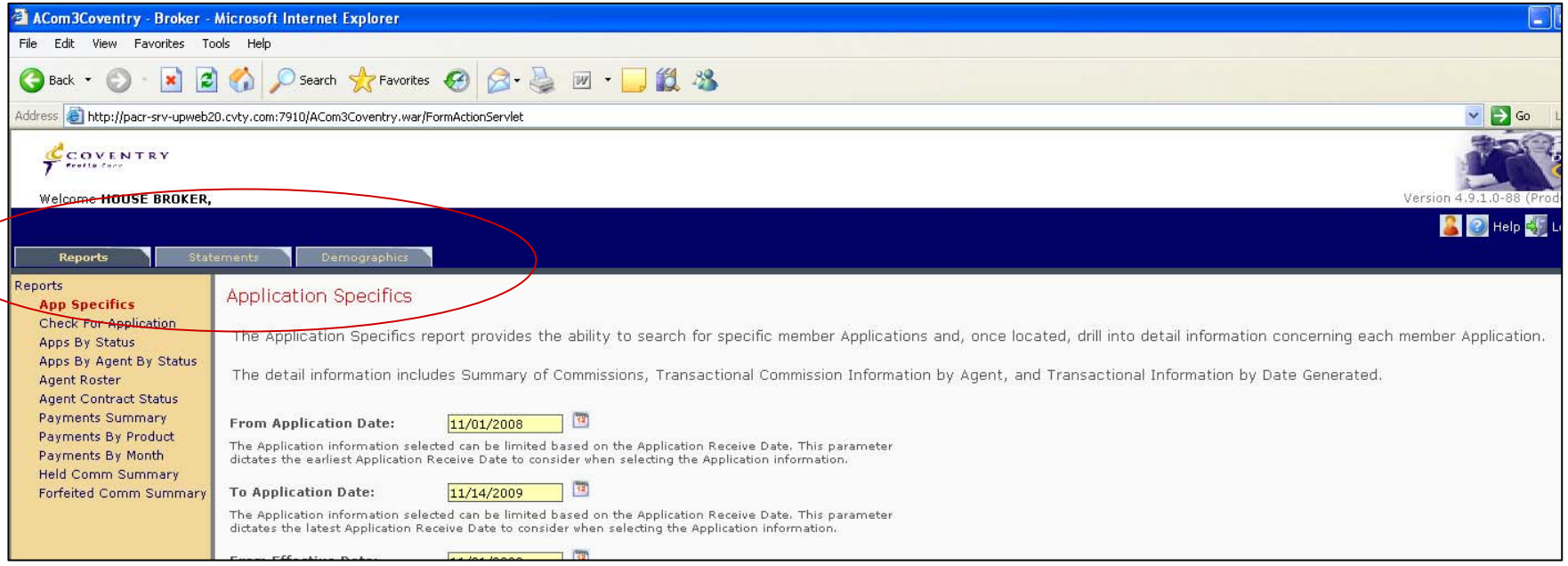
   Be sure to enter a "password hint" for future reference, if ever needed

   Write your password down to have it handy

4. Click on the "Log In" button to get started using App Tracker!

App Tracker Main Menu

- This is the home screen or “Main Menu” that will be presented after the Log In process is complete.
- There are three tabs present on the screen: Reports, Statements, Demographics


ACom3Coventry - Broker - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://pacr-srv-upweb20.cvty.com:7910/ACom3Coventry.war/FormActionServlet
Go
COVENTRY
Welcome HOUSE BROKER,
Version 4.9.1.0-88 (Prod
Help
Reports
Statements
Demographics
Reports
App Specifics
Check For Application
Apps By Status
Apps By Agent By Status
Agent Roster
Agent Contract Status
Payments Summary
Payments By Product
Payments By Month
Held Comm Summary
Forfeited Comm Summary
Application Specifics
The Application Specifics report provides the ability to search for specific member Applications and, once located, drill into detail information concerning each member Application.
The detail information includes Summary of Commissions, Transactional Commission Information by Agent, and Transactional Information by Date Generated.
From Application Date:
11/01/2008
The Application information selected can be limited based on the Application Receive Date. This parameter dictates the earliest Application Receive Date to consider when selecting the Application information.
To Application Date:
11/14/2009
The Application information selected can be limited based on the Application Receive Date. This parameter dictates the latest Application Receive Date to consider when selecting the Application information.

REPORTS Available on App Tracker

Most Frequently Selected Reports:

Application Specifics

- Check for status of a submitted Application
- Check for receipt of Application by Coventry

Commissions Paid – by Product; by Month

- Commissions Summary

Agent Contract Status

Example #1: Application Specifics

- Select the reporting function you want App Tracker to perform
- Use the convenient calendar to select date range for your search
- *Click on* **Run Report**

COVENTRY
Welcome Lavett Associates
Version 4.9.1.0-10 (ACom
Reports
Statements
Demographics
Commission Inquiries
Request
Reports
App Specifics
Check For Application
Apps By Status
Apps By Agent By Statu
Agent Roster
Agent Contract Status
Payments Summary
Payments By Product
Payments By Month
Held Commission Summ
Held Commission Detail
Forfeited Comm Summ
Forfeited Comm Details
Application Specifics
The Application Specifics report provides the ability to search for specific member Applications and, once located, drill into detail information concerning each me
Application.
The detail information includes Summary of Commissions, Transactional Commission Information by Agent, and Transactional Information by Date Generated.
NOTE: Search fields are not case specific
From Application Date:
11/15/2007
The Application information selected can be limited based on the Application Receive Date. This parameter
dictates the earliest Application Receive Date to consider when selecting the Application information.
To Application Date:
11/14/2008

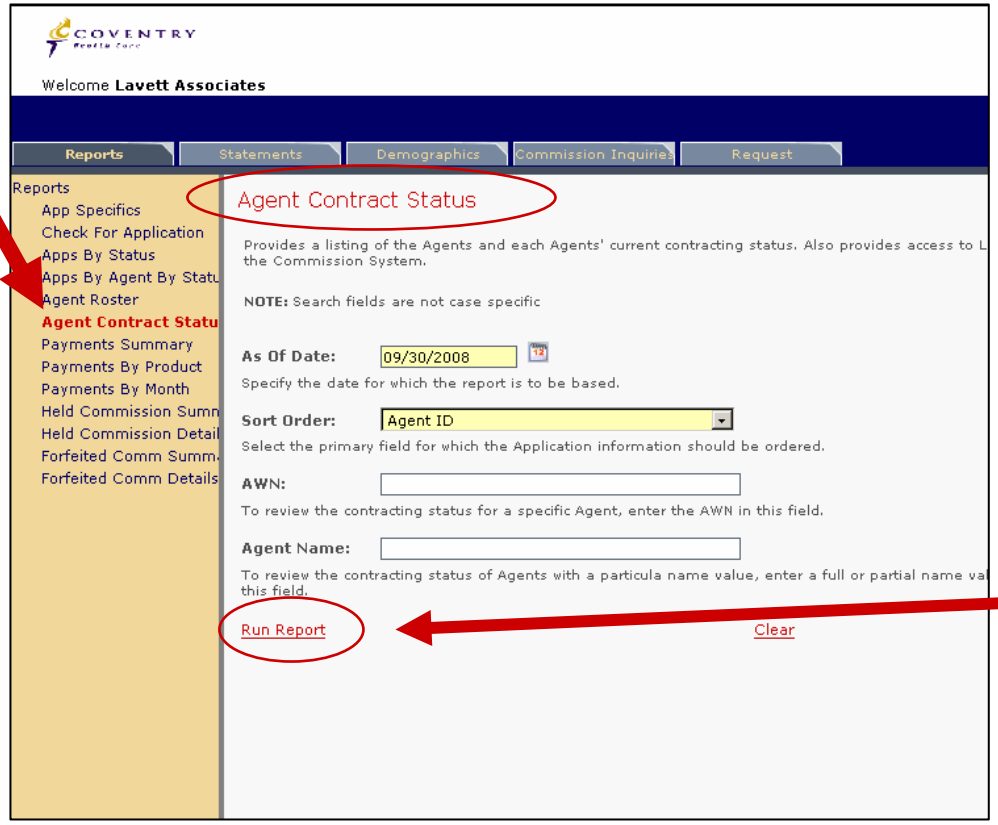
Check for Receipt of Application

If that particular application does not appear on the App Specifics report…

- You can verify receipt of the application by Coventry Enrollment Department

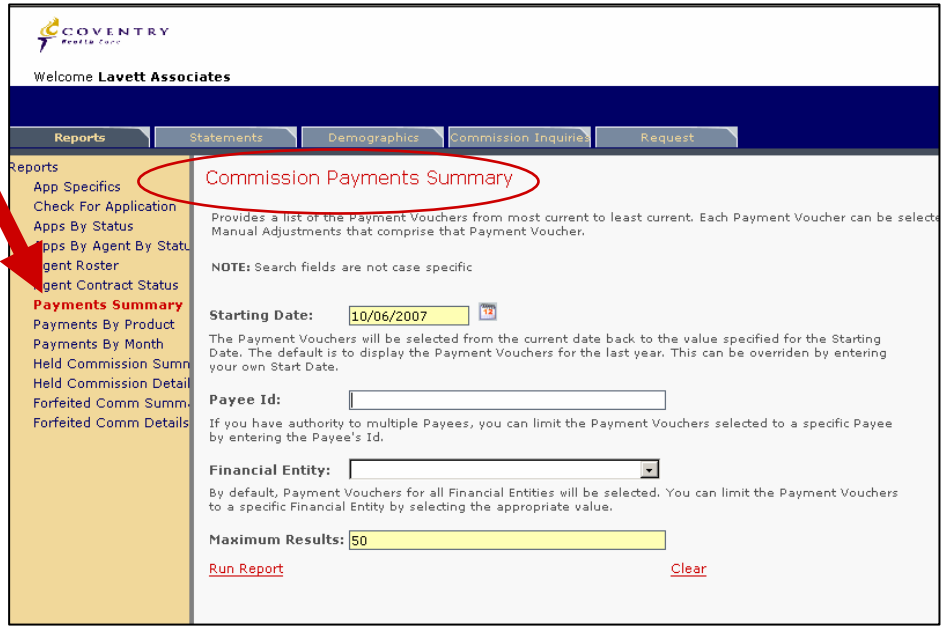
  Click on "**Check for Application**"

Example #2: Agent Contract Status


COVENTRY
Welcome Lavett Associates
Reports
Statements
Demographics
Commission Inquiries
Request
Reports
App Specifics
Check For Application
Apps By Status
Apps By Agent By Statu
Agent Roster
Agent Contract Statu
Payments Summary
Payments By Product
Payments By Month
Held Commission Summ
Held Commission Detail
Forfeited Comm Summ
Forfeited Comm Details
Agent Contract Status
Provides a listing of the Agents and each Agents' current contracting status. Also provides access to L
the Commission System.
NOTE: Search fields are not case specific
As Of Date:
09/30/2008
Specify the date for which the report is to be based.
Sort Order:
Agent ID
Select the primary field for which the Application information should be ordered.
AWN:
To review the contracting status for a specific Agent, enter the AWN in this field.
Agent Name:
To review the contracting status of Agents with a particula name value, enter a full or partial name va
this field.
Run Report
Clear

- Input the "As of Date" and other requested information
- *Click on* **Run Report**

Example #3: Commissions Paid


COVENTRY
Welcome Lavett Associates
Reports
Statements
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Commission Inquiries
Request
Reports
App Specifics
Check For Application
Apps By Status
Payments Summary
Payments By Product
Payments By Month
Held Commission Summ
Held Commission Detail
Forfeited Comm Summ
Forfeited Comm Details
Commission Payments Summary
Provides a list of the Payment Vouchers from most current to least current. Each Payment Voucher can be selecte
Manual Adjustments that comprise that Payment Voucher.
NOTE: Search fields are not case specific
Starting Date:
10/06/2007
The Payment Vouchers will be selected from the current date back to the value specified for the Starting Date. The default is to display the Payment Vouchers for the last year. This can be overriden by entering your own Start Date.
Payee Id:
If you have authority to multiple Payees, you can limit the Payment Vouchers selected to a specific Payee by entering the Payee's Id.
Financial Entity:
By default, Payment Vouchers for all Financial Entities will be selected. You can limit the Payment Vouchers to a specific Financial Entity by selecting the appropriate value.
Maximum Results:
50
Run Report
Clear

- Information is available based on specific criteria you indicate …
- Payment by month
- Payment by products
- Statements

Reminders

- Your Agent Writing Number (AWN) is required to use App Tracker system
- Access the App Tracker from the secure Broker Portal at www.coventry-medicare.com
- Application Status generally available within 3-5 business days after receipt at Coventry
- Log in and explore!

For Assistance

Once logged into the App Tracker, if you cannot access status of an application, commissions or other issues please contact the Broker Services Department:

1-866-714-9301

Monday – Friday 8 a.m. – 6 p.m. ET